



Program Management Handbook:

Handbook Tool Kit

Office for Domestic Preparedness



Office of State and Local Government
Coordination and Preparedness

About the Tool Kit

Purpose

The Office for Domestic Preparedness (ODP) has developed the “ODP Program Management Handbook” (Handbook) to provide practical assistance for strengthening State, local, and tribal homeland security programs. The Handbook is being disseminated as homeland security administrators face increasing responsibilities from national preparedness initiatives such as the National Incident Management System (NIMS), the National Response Plan (NRP), and the National Preparedness Goal. The program management fundamentals outlined in this Handbook will support the management of core elements that are common throughout the initiatives – planning, equipment, training, and exercises.

During the Handbook design process, ODP solicited input from state and local stakeholders who recommended that representatives from each State Administrative Agency (SAA) and designated Urban Area deliver the Handbooks to statewide recipients in person, when possible, and provide training on how to use the Handbooks. They advised that in-person delivery would help to ensure that the guidelines in the Handbooks are widely used to organize and manage homeland security programs. Therefore, ODP is relying on program administrators within the SAA and designated Urban Areas to deliver the Handbook to the following stakeholders:

- Homeland security program administrators at State and local levels who oversee holistic homeland security programs (e.g., program administrators within the SAA and designated Urban Areas);
- Managers or points of contact throughout the State who are directly responsible for implementing elements and activities associated with planning, equipment, training, and exercises; and
- State policy makers who have a vested interest in ensuring that their respective State’s homeland security programs are managed effectively.

This ODP Program Management Handbook Tool Kit (Tool Kit) has been developed to provide guidance and materials to assist States in distributing the Handbooks to these key statewide stakeholders. ODP recognizes that in-person delivery of the Handbook to all state stakeholders may not be feasible for all program administrators, due to limited resources and competing priorities. Therefore, this Tool Kit provides an outline of different types of delivery methods from which program administrators can choose.

Tool Kit Components

<i>Component</i>	<i>Description</i>
About the Tool Kit	Background of the Tool Kit and a list of its contents
Dissemination Guidance	Outlines of different dissemination options which include identifying stakeholders to receive the Handbook, or information about it, and establishing a delivery schedule
	Sample templates for use in planning and tracking statewide dissemination
Dissemination Resources	Sample agendas, presentations, and talking points which can be used in trainings and briefings
Program Management FAQs	Compilation of frequently asked questions related to the purpose of the Handbook and Tool Kit and the application of the guidance in each

State Program Manager Dissemination Plan Guidance

Purpose

The Office for Domestic Preparedness (ODP) has developed the “ODP Program Management Handbook” to provide practical assistance for strengthening State, local, and tribal homeland security programs. The goal of this guidance is to enable the SAAS/UASIs to follow a simple process to disseminate the Handbook as seamlessly and as quickly as possible, while introducing and explaining them sufficiently.

Getting Started

ODP will rely on the program administrator within the SAA/UASI to distribute the handbook to key stakeholders throughout the state and determine which guidelines are applicable for each. The purpose of the State Program Manager Dissemination Plan Guidance is to provide the SAAs/UASIs assistance in:

- Identifying all state program managers and POCs who should receive and use the Handbooks
- Selecting the appropriate Handbook delivery method & developing a delivery schedule

Selecting a Handbook Delivery Option to Program Managers

ODP is providing an outline of three different options for dissemination in the following section ranging from convening regional or statewide meetings to distributing the Handbooks via mail. Each SAA/UASI can select the option that best meets the needs of their respective state and is the most feasible solution given existing resources. To assist SAAs/UASIs in determining the best method of disseminating the Handbooks, ODP has described the basic steps necessary to disseminate the Handbook for each option and has also identified some potential pros and cons related to each option.

OPTION A: REGIONAL/STATEWIDE MEETINGS

Description, Pros & Cons:

<i>Option</i>	<i>Description</i>	<i>Pros</i>	<i>Cons</i>
A. Regional/Statewide Presentation	<ul style="list-style-type: none"> The presentation and training on use of the Handbooks could be given at a statewide or regional meeting set up for this purpose or could be a track within a larger, pre-existing conference about homeland security related topics such as HSPD-8 implementation. 	<ul style="list-style-type: none"> Face-to-face delivery provides an opportunity to explain the Handbook's uses and underscores its importance. The ability to reach many stakeholders at once decreases the number of meetings necessary to disseminate. This option offers participants in the meeting the opportunity to network with one another and share lessons learned/best practices. It ensures a consistent message regarding the Handbook is delivered. 	<ul style="list-style-type: none"> Often a significant time commitment is necessary to arrange the resources and logistics of the meeting. It is necessary to plan in advance to get permission to participate in a larger, pre-existing conference.

Steps for disseminating Handbooks via regional/statewide meetings:

1. Identify those program managers who should receive the Handbooks as described in the "Identifying Program Stakeholders" Guideline in the Program Administrator Guidelines section of the Handbook, and identify representatives from the SAA/UASI who may need to be present at the meeting in addition to the recipients of the Handbook.
2. Obtain program manager contact information.
3. Poll key program managers to identify available dates and locations for a meeting/conference.
4. Set date and location for meeting/conference.
5. Identify POC responsible for logistics of meeting (e.g., reserving a conference room/site, arranging AV equipment for presentation, etc.).
6. Identify POC responsible for sending invitations to program managers and tracking RSVPs (note: invitations could use much of the language in the Sample Cover Letter/Email Language for Program Managers documented located in the Dissemination Resources section of this Tool Kit).
7. Identify the presenter(s).

8. Determine meeting agenda (see sample—located in the Dissemination Resources Section of the Tool Kit).
9. Identify the necessary materials for the meeting and who is responsible for organizing them.

Example of tracking logistics

<i>Title of Program Manager</i>	<i>Names of Recipients & Emails</i>	<i>Address & Phone</i>	<i>Available Dates and Locations to Meet</i>	<i>POC for Logistics</i>	<i>POC for Invitations</i>	<i>Meeting Agenda Complete</i>	<i>Necessary Materials and POC</i>	<i>Date Completed</i>
Training program manager	Bill Jones Bill.Jones@mo.gov	1234 S West St Jefferson, MO 23847 222-222-2222	Oct. 23, 2005 Joint Information Center, Jefferson	Jerry Ryan	Sally Smith	Yes	Binders, presentations Sally Smith	Oct 23, 2005

OPTION B: ONE-ON-ONE MEETINGS

Description, Pros & Cons:

<i>Option</i>	<i>Description</i>	<i>Pros</i>	<i>Cons</i>
B. One-on-one Meetings	<ul style="list-style-type: none"> This is more informal than the presentation option. The SAA/UASI would deliver the Handbook in individual meetings with select program managers. 	<ul style="list-style-type: none"> Face-to-face delivery provides and opportunity to explain the Handbook's uses and underscores its importance. This option does not require wide-scale conference/meeting planning. It provides an opportunity to address program management issues specific to that program manager. 	<ul style="list-style-type: none"> Many one-on-one meetings necessary to deliver to all identified stakeholders could be time consuming and ability to reach all relevant stakeholders in a timely manner could be challenging. It is more challenging to deliver a consistent message regarding the Handbook from meeting to meeting.

Steps for disseminating Handbooks via one-on-one meetings:

1. Identify those program managers who should receive the Handbooks as described in the "Identifying Program Stakeholders" Guideline in the Program Administrator Guidelines section of the Handbook.
2. Obtain program manager contact information.
3. Contact the program manager to determine the meeting date, time, and location.
4. Identify the presenter.
5. Determine meeting agenda (see sample located in the Dissemination Resources Section of the Tool Kit—it is possible to use an abbreviated version of this for one-on-one meeting).
6. Identify the necessary materials for the meeting and who is responsible for preparing them.

Example of tracking logistics:

<i>Title of Program Manager</i>	<i>Name of Recipient & Email</i>	<i>Address</i>	<i>Phone</i>	<i>Available Dates to Meet</i>	<i>Location</i>	<i>Presenter(s)</i>	<i>Meeting Agenda Complete</i>	<i>POC for Contacting Program Manager</i>	<i>Necessary Materials and POC</i>	<i>Date Completed</i>
Training program manager	Bill Jones Bill.Jones@mo.gov	1234 S West St Jefferson, MO 23847	222-222-2222	Oct. 23, 2005	Joint Information Center, Jefferson	Sally Smith	Yes	Jerry Ryan	Binders, presentations Sally Smith	Oct 23, 2005

OPTION C: MAIL/EMAIL

Description, Pros & Cons:

<i>Option</i>	<i>Description</i>	<i>Pros</i>	<i>Cons</i>
C. Mail/email and follow up phone call	<ul style="list-style-type: none"> Because the Handbook will be available in electronic format it is possible for the SAA/UASI to email the Handbook to the program managers. ODP has provided the SAA/UASI with standard language to use in drafting a cover letter or email message. 	<ul style="list-style-type: none"> The main advantage is the ability to reach many program managers without having to organize meetings. This ensures a consistent message regarding the Handbook is delivered. A follow up phone call provides the opportunity to answer questions regarding the Handbook and to ensure that the Handbook was received. 	<ul style="list-style-type: none"> The lack of face-to-face delivery does not allow the SAA/UASI to explain the Handbook's uses or underscore its importance.

Steps for disseminating via mail/email:

1. Identify those program managers who should receive the Handbooks as described in the "Identifying Program Stakeholders" Guideline in the Program Administrator Guidelines section of the Handbook and identify those stakeholders who should be copied on the email/ mailing.
2. Obtain program manager contact information.
3. Set a target date for dissemination.
4. Determine if mail or email is more effective means of delivery and identify POC to coordinate.
5. Tailor email/cover letter language as necessary.
6. Identify POC to be responsible for making the follow-up phone call following the Handbook mailing/emailing.

Example of tracking logistics:

<i>Title of Program Manager</i>	<i>Name of Recipient & Email</i>	<i>Address</i>	<i>Phone</i>	<i>Target Date for Dissemination</i>	<i>Mail or Email?</i>	<i>POC for Tailoring Language</i>	<i>POC for Coordinating Mailing / Emailing</i>	<i>POC for Follow-up</i>	<i>Date Completed</i>
Training program manager	Bill Jones Bill.Jones@mo.gov	1234 S West St Jefferson, MO 23847	222-222-2222	Oct. 23, 2005	Email	Carrie Black	Jerry Ryan	Cynthia White	Oct. 23, 2005

Resources for Disseminating to State Program Managers

- I. Sample Session Design for Handbook Presentation**
- II. “ODP Program Management Handbook: Program Management Briefing”—with talking points for the presenter**
- III. “ODP Program Management Handbook: Program Management Briefing”—handout for the recipient**
- IV. Sample Cover Letter/Email Language for Program Managers**

BACKGROUND

Purpose

To disseminate the Handbook to managers or points of contact throughout the State who are directly responsible for implementing elements and activities associated with planning, equipment, training, and exercises.

Scope

The briefing will consist of a 4 hour session¹ with the following activities:

- ▶ Deliver the overview presentation “ODP Program Management Handbook: Program Management Briefing”
- ▶ Facilitated practice session using selected guidelines
- ▶ Q & A
- ▶ Next steps

DRAFT HANDBOOK PRESENTATION SESSION DESIGN

<i>Time</i>	<i>Topic</i>	<i>Objectives</i>	<i>Approach</i>	<i>Session Notes</i>
30 minutes	Welcome / Introduction	<ul style="list-style-type: none"> ▶ To welcome participants ▶ To provide an overview and background for the session ▶ To review ground rules for discussion 	<ul style="list-style-type: none"> ▶ SAA / UASI Administrator: thank participants for coming and provide agenda / session overview ▶ SAA / UASI Administrator: work with group to establish ground rules for the session 	<ul style="list-style-type: none"> ▶ Talking points ▶ Chart paper for ground rules ▶ Agendas
60 minutes	Program Management Handbook	<ul style="list-style-type: none"> ▶ To deliver the ODP Program Management Handbook Program Management Briefing ▶ To deliver a detailed walk through of the Handbook contents 	<ul style="list-style-type: none"> ▶ SAA / UASI Administrator: deliver the ODP Program Management Handbook Program Management Briefing that is provided in the Handbook Tool Kit 	<ul style="list-style-type: none"> ▶ Talking points ▶ PowerPoint presentation ▶ Copies of the Handbook
90 minutes	Facilitated practice session	<ul style="list-style-type: none"> ▶ To practice using selected guidelines 	<ul style="list-style-type: none"> ▶ SAA / UASI Administrator: determine a set of guidelines to practice using as a group ▶ Participants: work within their table to practice using the steps and activities described in the guidelines ▶ Participants: designate a person to present their work plan 	<ul style="list-style-type: none"> ▶ Activity instructions
30 minutes	Q & A	<ul style="list-style-type: none"> ▶ To answer questions relating to the Handbook 	<ul style="list-style-type: none"> ▶ Participants: ask the SAA / UASI any outstanding questions they may have regarding the Handbook 	<ul style="list-style-type: none"> ▶ FAQs
30 minutes	Next Steps	<ul style="list-style-type: none"> ▶ To discuss implementation of the Handbook ▶ To set expectations of how the Handbook should be used 	<ul style="list-style-type: none"> ▶ SAA / UASI Administrator: work with group to establish expectations for how the Handbook will be used in the state / region 	

¹ Timeframe and presentation content can be adjusted by SAA/UASI according to time and resource limitations and other considerations.

ODP Program Management Handbook

Program Management Briefing



- ▶ The Office for Domestic Preparedness recently distributed program management handbooks to every state
- ▶ They have asked us to distribute these within our state as we work with them to implement some of the recent national initiatives
- ▶ The Handbook is a resource and not a requirement or standard

Agenda

▶ ODP Program Management Handbook: Introduction

- ▶ How to Use the Handbook
- ▶ Who Should Receive the Handbook
- ▶ Q & A



- ▶ We're here today to provide a brief introduction and discuss how we hope we'll be able to implement this within our state
- ▶ We'll explain how the Handbook can be used
- ▶ We'll let you know who else has received the Handbook
- ▶ Finally, we'll answer any questions you may have regarding the Handbook

The Program Management Handbook is a management tool for homeland security administrators and managers

Key messages regarding the (1) background, (2) target audiences, and (3) suggested uses of the Handbook

► Background:

- The Handbook is being disseminated as homeland security administrators face increasing responsibilities from national preparedness initiatives such as the NIMS, NRP, and the National Preparedness Goal
- The Handbook outlines program management fundamentals that can support the management of core elements that are common across various initiatives: planning, equipment, training, and exercises

► Target Audiences:

- Homeland security administrators at State and local levels (e.g., program administrators within the State Administrative Agency (SAA) and designated Urban Areas)
- Managers or points of contact throughout the State who are directly responsible for implementing various aspects of homeland security, including: planning, equipment, training, and exercise activities

► Suggested Uses:

- Resource to help administrators manage multiple homeland security-related initiatives and programs
- Guide for developing program management work plans
- Tool to gauge existing program management processes and performance
- Guide for developing employee performance plans



- Foremost, the Handbook is being disseminated as State and local administrators face increasing responsibilities from national preparedness initiatives such as the NIMS, NRP, and the National Preparedness Goal
- The Handbook outlines program management fundamentals that can support the management of planning, equipment, training, and exercise activities – these are four elements which are common throughout multiple preparedness initiatives
- The Handbook’s guidelines can be used by two audiences: one guideline set is for administrators within the SAA or Urban Area who are responsible for coordinating all homeland security efforts
- The remaining guidelines can be used by points of contact who are directly responsible for implementing activities associated with planning, equipment, training, and exercises
- The guidelines emphasize collaboration and coordination, especially across disciplines and with the private sector
- Finally, the Handbook is not a mandated approach – it should serve as a management resource and reference
- Here we’ve also described a few additional ways the Handbook can be used

To develop the Handbook, ODP engaged and relied on the experience and input from Federal, State, and local homeland security program management stakeholders

► Federal Stakeholder Input

- ODP developed a team of Federal Preparedness, Training, Exercise, and Technical Assistance Officers to develop and tailor the Handbook for unique homeland security program management responsibilities
- The team met regularly to develop and review Handbook content

► State and Local Stakeholder Input

- ODP hosted a 2-day conference with State and local representatives from across the nation to solicit feedback and recommendations for improving the Handbook
- ODP conducted several conference calls to collect feedback on subsequent Handbook revisions



- The Handbook has been designed for daily use and ODP relied on input from stakeholders across the nation, people like you and me, so they really preface this Handbook as “The Product of the Field and Field Experience”

Agenda

- ▶ ODP Program Management Handbook: Introduction
- ▶ How to Use the Handbook
- ▶ Who Should Receive the Handbook
- ▶ Q & A

The Handbook contains the following resources and information in a user-friendly format

Handbook Component	Description
Foreword	▶ High-level, executive management summary that explains the intent of the Handbook as a tool to offer assistance and provides context for the Handbook's applicability
About the Handbook	▶ Brief, upfront description of the Handbook components and illustration of how the work plans should be used
Guideline Prefaces	▶ One-page introduction for each guideline set that explains how the guidelines can be used
Guidelines	<p>▶ Five guideline sets; one for homeland security administrators (e.g., administrators within the SAA and UASI region) and four for planning, equipment, training, and exercises</p> <p>▶ Guidelines are written in a user-friendly, checklist format</p>
Guideline Work Plans	▶ Templates accompanying each guideline page that enable the user to plan and track activity completion
Working Calendars	▶ Calendars for each guideline set that enable the user to create and track program milestones and deadlines
Program Management Resources	<p>▶ A list of ODP websites and contacts for further information regarding program management</p> <p>▶ Sample templates and planning documents that enhance the guidelines</p>
Glossary	▶ Contextual definitions of Handbook terms and acronyms



- ▶ The Handbook has been designed in a format that should be a useful tool for program managers (refer to the samples)
- ▶ The first section of the Handbook is an introduction with a letter from Tim Beres, the director of ODP, explaining the background, purpose, and uses of the Handbook as well as a section that outlines how to use the various sections of the Handbook
- ▶ The following sections contain 5 sets of guidelines with one set for administrators within the SAA or UASI; the other guidelines are for managers or points of contact who oversee planning, equipment, training and exercises activities
- ▶ The guidelines are formatted in a check list style with an accompanying work plan on the opposite page where users can track a POC responsible for completing the activity, the completion date as well as any other relevant information for the activity
- ▶ Each section also has a resource list with ODP resources/contacts and a calendar to track milestones and deadlines; these resource lists were developed with the assistance of CSID
- ▶ Next is a glossary of terms and acronyms used throughout the Handbook; this glossary was also developed with the assistance of CSID

The guidelines consist of suggested practices for important program management responsibilities

ILLUSTRATIVE

Sample Homeland Security Administrator Guidelines*

- ▶ The Handbook outlines suggested practices as guidelines for Homeland Security Administrators (e.g., administrators within the SAA or UASI), e.g.:
 - *Identifying program stakeholders*
 - *Communicating with program stakeholders*
 - *Ensuring coordination between the Senior Advisory Committee, Urban Area Working Group, planning, equipment, training, and exercise working groups, and other homeland security – related working groups*
 - *Guiding maintenance of the state / UASI strategy*
 - *Evaluating performance of the overall homeland security program*

Sample Planning, Equipment, Training, and Exercise Guidelines*

- ▶ The Handbook outlines suggested practices as guidelines for developing, coordinating, and maintaining activities and elements associated with planning, equipment, training and exercises, e.g.:
 - *Assembling a planning working group*
 - *Conducting an assessment to develop planning priorities*
 - *Developing a planning approach*
 - *Identifying staffing needs*
 - *Identifying non-monetary resources and promising practices to support planning activities*
 - *Evaluating planning contractors / vendors / providers*

* These guideline lists are not comprehensive; the Handbook sections contain additional guideline topics



**Homeland
Security**

- ▶ These 2 boxes are snapshots of the guideline content and these are some of the actual guideline topics
- ▶ These were the topics that were identified as critical aspects of program management
- ▶ For each of these topics, there are suggested practices that can be used as guidelines

Holistic program management can assist State and locals as they prepare to prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies

Holistic program management involves...

An integrated approach demonstrating robust collaboration between the public and private sectors, different levels of government, multiple jurisdictions, and departments and agencies within a single jurisdiction to accomplish core activities related to:

Planning

Equipment

Training

Exercises

...that supports the mission areas of the National Preparedness Goal:

Prevent

Protect

Respond

Recover



- ▶ The Handbook does have a strong connection with the National Preparedness Goal, because strong program management is going to the mechanism that enables each state and region to develop and coordinate capabilities to better prevent, protect against, respond to, and recover from terrorist acts, disasters, and emergencies
- ▶ And as the slide shows, holistic management involves collaboration between the public and private sectors, among levels of government, and many stakeholders to accomplish activities associated with planning, equipment, training, and exercises, which are common elements found throughout many preparedness initiatives
- ▶ States and Urban Areas are getting a lot of guidance at a detailed level. What's missing is the assistance to help implement that detail. This Handbook provides the infrastructure to pull it together

Sound program management enables development and coordination of core elements needed to achieve Target Capability outcomes

ILLUSTRATIVE

Example Target Capability

Core Elements Involved in Achieving Capability Outcomes

Program Management Handbook: Support for Developing and Coordinating Core Elements



Planning

- ▶ All applicable legislation, regulations, related plans, directives, policies, & industry codes of practice required to conduct emergency response
- ▶ Emergency Operations Plan consistent with NRP/NIMS and applicable laws and regulations
- ▶ Chemical inventory reports available under Emergency Planning and Community Right-to-know Act in association with the LEPC

Sample Planning Guidelines

- ▶ Conducting an assessment to identify planning priorities
- ▶ Developing a planning approach
- ▶ Incorporating legal and programmatic policies, requirements, standards, and regulations that impact planning

Equipment and Systems

- ▶ Geographic Information Systems tools Information-sharing network
- ▶ Modeling/simulation/analysis tools

Sample Equipment Guidelines

- ▶ Developing an equipment priority purchase list
- ▶ Evaluating equipment vendors

Training

- ▶ NIMS
- ▶ Technical (e.g. modeling/simulation and analysis tools training)
- ▶ Emergency planning and assessment for emergency response personnel

Sample Training Guidelines

- ▶ Identifying training stakeholders
- ▶ Communicating with training stakeholders
- ▶ Developing a training approach

Exercises, Evaluations, and Corrective Actions

- ▶ Exercises to test and evaluate vulnerabilities and hazards
- ▶ System for incorporating lessons learned into plans and procedures

Sample Exercise Guidelines

- ▶ Conducting an assessment to develop exercise priorities
- ▶ Developing an exercise approach



Homeland Security

- ▶ For example, looking at the Target Capabilities – and here we see Risk Analysis – there are combinations of planning, equipment, training, and exercise elements recommended for each capability
- ▶ As you can see, the management guidelines are aligned with these elements, and they can help administrators or managers organize themselves effectively to implement and accomplish the recommended planning, equipment, training, and exercise components

Agenda

- ▶ ODP Program Management Handbook: Introduction
- ▶ How to Use the Handbook
- ▶ Who Should Receive the Handbook
- ▶ Q & A

Version 1.0 of the Handbook was delivered to SAA and UASI representatives during three conferences in the late summer and early fall of 2005

- ▶ The Handbook was delivered to all homeland security SAA and UASI administrators during regional conferences
- ▶ The national, widespread dissemination of the Handbook underscores the increasing emphasis on results-based performance and holistic management of multiple homeland security initiatives and funded programs
- ▶ As the Handbook is implemented, ODP will solicit feedback on its usability and issue subsequent versions on an annual basis



- ▶ ODP delivered these Handbooks at the Regional Conference we attended on <DATE>
- ▶ They delivered them to all States and Urban Areas across the nation

The Handbook is being disseminated to administrators and managers across our State who administer and oversee homeland security activities

<i>Name</i>	<i>Jurisdiction / Region</i>	<i>Homeland Security Program Management Affiliation</i>



- ▶ We, in turn, are disseminating the Handbooks throughout our State and region and here you see who else in the State has received the Handbook
- ▶ The goal is that we will all be working within a common program management framework so that we can increase coordination across the State
- ▶ Our hope is that users within the State will network with one another and share lessons learned as well as promising practices; this sort of information sharing is one of the best, and relatively easy, ways we have of enhancing our homeland security program management

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▶ Q & A

Frequently Asked Questions about the Handbook...

- ▶ Will the guidelines in the Handbook be a requirement for future grant programs?
 - Implementation of the Handbook is not a requirement. ODP's goal is to support the development of holistic program management capabilities. Holistic program management will help us develop, coordinate, and maintain the capabilities that will enable our nation to better prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies.
- ▶ Who was involved in the development process?
 - A team of Federal Preparedness, Training, and Exercise officers assisted in developing and tailoring the Handbook for unique homeland security program management responsibilities.
 - State and local representatives provided feedback and recommendations for the improving initial Handbook versions; these representatives also participated in several conference calls to provide feedback and input on subsequent Handbook versions.
- ▶ How is the Handbook related to HSPD-8 and the National Preparedness Goal?
 - These initiatives form a common approach and establish a shared commitment among Federal, State, local, and tribal governments and the private sector to strengthen our Nation's preparedness by building effective capabilities to prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies. *The program management fundamentals outlined in this Handbook will support the management of core elements that are common throughout the initiatives – planning, equipment, training, and exercises.* Successful implementation of the initiatives ultimately depends on robust collaboration and an integrated approach that incorporates these elements and encompasses a wide range of activities aimed at coordinating the capabilities and resources of various entities including agencies, organizations, and individuals from many tiers of public and private sectors.



This is a list of frequently asked questions—let's review them.

Frequently Asked Questions about the Handbook (cont.)...

- ▶ Does the Handbook outline a specific organizational structure that states should implement in order to manage their programs?
 - The Handbook outlines a common framework which can guide the establishment and enhancement of homeland security preparedness organizations, programs, and processes. While individual components within the framework may change over time, the framework should remain robust and relatively unchanged.
- ▶ How is the Handbook different from HSEEP?
 - The HSEEP Guidance and the Handbook guidelines are complementary to one another.
- ▶ How does the Handbook relate to NCJA Grants Management?
 - The Handbook targets developing managerial and organizational structures and processes to support holistic, coordinated homeland security program management and NCJA's TA helps grant administrators implement promising practices and improve the performance of various task associated with grants administration.
- ▶ What is the timeframe for delivering the Handbook?
 - ODP recognizes that each state and urban area will want to approach dissemination and delivery of the Handbook in its own way. Because of this, ODP has not set a timeframe for delivering the Handbook. However, ODP recommends that delivery of the Handbook happen as soon as possible as the guidelines contained within the Handbook can help state and local governments organize themselves as they attempt to become compliant with federal initiatives and policy.



This is a list of frequently asked questions—let's review them.



ODP Program Management Handbook

Program Management Briefing

Agenda

- ▶ ODP Program Management Handbook: Introduction
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The Program Management Handbook is a management tool for homeland security administrators and managers

*Key messages
regarding the
(1) background,
(2) target
audiences, and
(3) suggested
uses of the
Handbook*

► Background:

- The Handbook is being disseminated as homeland security administrators face increasing responsibilities from national preparedness initiatives such as the NIMS, NRP, and the National Preparedness Goal
- The Handbook outlines program management fundamentals that can support the management of core elements that are common across various initiatives: planning, equipment, training, and exercises

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► Suggested Uses:

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- Guide for developing program management work plans
- Tool to gauge existing program management processes and performance
- Guide for developing employee performance plans



**Homeland
Security**

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Guidelines	<ul style="list-style-type: none"> ▶ Five guideline sets; one for homeland security administrators (e.g., administrators within the SAA and UASI region) and four for planning, equipment, training, and exercises ▶ Guidelines are written in a user-friendly, checklist format
Guideline Work Plans	<ul style="list-style-type: none"> ▶ Templates accompanying each guideline page that enable the user to plan and track activity completion
Working Calendars	<ul style="list-style-type: none"> ▶ Calendars for each guideline set that enable the user to create and track program milestones and deadlines
Program Management Resources	<ul style="list-style-type: none"> ▶ A list of ODP websites and contacts for further information regarding program management ▶ Sample templates and planning documents that enhance the guidelines
Glossary	<ul style="list-style-type: none"> ▶ Contextual definitions of Handbook terms and acronyms

The guidelines consist of suggested practices for important program management responsibilities

Sample Homeland Security Administrator Guidelines*

- ▶ The Handbook outlines suggested practices as guidelines for Homeland Security Administrators (e.g., administrators within the SAA or UASI), e.g.:
 - *Identifying program stakeholders*
 - *Communicating with program stakeholders*
 - *Ensuring coordination between the Senior Advisory Committee, Urban Area Working Group, planning, equipment, training, and exercise working groups, and other homeland security – related working groups*
 - *Guiding maintenance of the state / UASI strategy*
 - *Evaluating performance of the overall homeland security program*

Sample Planning, Equipment, Training, and Exercise Guidelines*

ILLUSTRATIVE

- ▶ The Handbook outlines suggested practices as guidelines for developing, coordinating, and maintaining activities and elements associated with planning, equipment, training and exercises, e.g.:
 - *Assembling a planning working group*
 - *Conducting an assessment to develop planning priorities*
 - *Developing a planning approach*
 - *Identifying staffing needs*
 - *Identifying non-monetary resources and promising practices to support planning activities*
 - *Evaluating planning contractors / vendors / providers*

* These guideline lists are not comprehensive; the Handbook sections contain additional guideline topics



**Homeland
Security**

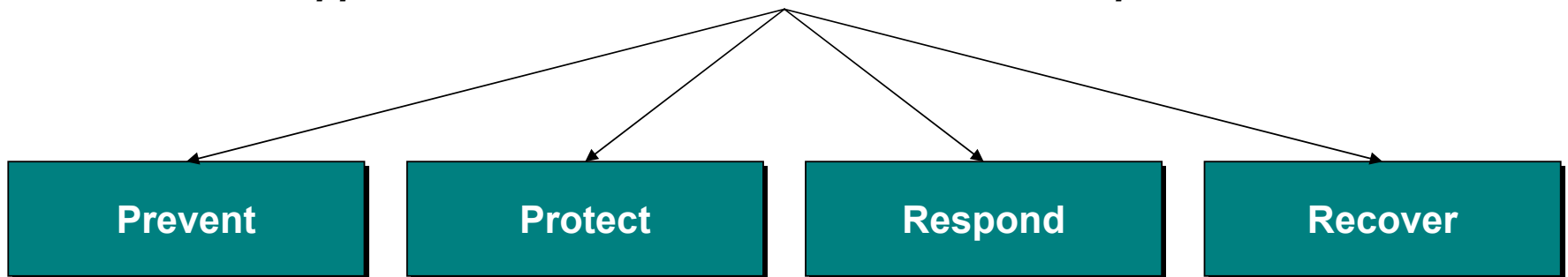
Holistic program management can assist State and locals as they prepare to prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies

Holistic program management involves...

An integrated approach demonstrating robust collaboration between the public and private sectors, different levels of government, multiple jurisdictions, and departments and agencies within a single jurisdiction to accomplish core activities related to:



...that supports the mission areas of the National Preparedness Goal:



Sound program management enables development and coordination of core elements needed to achieve Target Capability outcomes

ILLUSTRATIVE

Example Target Capability

Core Elements Involved in Achieving Capability Outcomes

Program Management Handbook: Support for Developing and Coordinating Core Elements

Risk Analysis

Planning

- ▶ All applicable legislation, regulations, related plans, directives, policies, & industry codes of practice required to conduct emergency response
- ▶ Emergency Operations Plan consistent with NRP/NIMS and applicable laws and regulations
- ▶ Chemical inventory reports available under Emergency Planning and Community Right-to-know Act in association with the LEPC

Sample Planning Guidelines

- ▶ Conducting an assessment to identify planning priorities
- ▶ Developing a planning approach
- ▶ Incorporating legal and programmatic policies, requirements, standards, and regulations that impact planning

Equipment and Systems

- ▶ Geographic Information Systems tools Information-sharing network
- ▶ Modeling/simulation/analysis tools

Sample Equipment Guidelines

- ▶ Developing an equipment priority purchase list
- ▶ Evaluating equipment vendors

Training

- ▶ NIMS
- ▶ Technical (e.g. modeling/simulation and analysis tools training)
- ▶ Emergency planning and assessment for emergency response personnel

Sample Training Guidelines

- ▶ Identifying training stakeholders
- ▶ Communicating with training stakeholders
- ▶ Developing a training approach

Exercises, Evaluations, and Corrective Actions

- ▶ Exercises to test and evaluate vulnerabilities and hazards
- ▶ System for incorporating lessons learned into plans and procedures

Sample Exercise Guidelines

- ▶ Conducting an assessment to develop exercise priorities
- ▶ Developing an exercise approach



Homeland Security

Agenda

- ▶ ODP Program Management Handbook: Introduction
- ▶ How to Use the Handbook
- ▶ Who Should Receive the Handbook
- ▶ Q & A

Version 1.0 of the Handbook was delivered to SAA and UASI representatives during three conferences in the late summer and early fall of 2005

- ▶ The Handbook was delivered to all homeland security SAA and UASI administrators during regional conferences
- ▶ The national, widespread dissemination of the Handbook underscores the increasing emphasis on results-based performance and holistic management of multiple homeland security initiatives and funded programs
- ▶ As the Handbook is implemented, ODP will solicit feedback on its usability and issue subsequent versions on an annual basis

The Handbook is being disseminated to administrators and managers across our State who administer and oversee homeland security activities

<i>Name</i>	<i>Jurisdiction / Region</i>	<i>Homeland Security Program Management Affiliation</i>



**Homeland
Security**

Agenda

- ▶ ODP Program Management Handbook: Introduction
- ▶ How to Use the Handbook
- ▶ Who Should Receive the Handbook
- ▶ Q & A

Frequently Asked Questions about the Handbook...

- ▶ Will the guidelines in the Handbook be a requirement for future grant programs?
 - Implementation of the Handbook is not a requirement. ODP's goal is to support the development of holistic program management capabilities. Holistic program management will help us develop, coordinate, and maintain the capabilities that will enable our nation to better prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies.
- ▶ Who was involved in the development process?
 - A team of Federal Preparedness, Training, and Exercise officers assisted in developing and tailoring the Handbook for unique homeland security program management responsibilities.
 - State and local representatives provided feedback and recommendations for the improving initial Handbook versions; these representatives also participated in several conference calls to provide feedback and input on subsequent Handbook versions.
- ▶ How is the Handbook related to HSPD-8 and the National Preparedness Goal?
 - These initiatives form a common approach and establish a shared commitment among Federal, State, local, and tribal governments and the private sector to strengthen our Nation's preparedness by building effective capabilities to prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies. *The program management fundamentals outlined in this Handbook will support the management of core elements that are common throughout the initiatives – planning, equipment, training, and exercises.* Successful implementation of the initiatives ultimately depends on robust collaboration and an integrated approach that incorporates these elements and encompasses a wide range of activities aimed at coordinating the capabilities and resources of various entities including agencies, organizations, and individuals from many tiers of public and private sectors.



Frequently Asked Questions about the Handbook (cont.)...

- ▶ Does the Handbook outline a specific organizational structure that states should implement in order to manage their programs?
 - The Handbook outlines a common framework which can guide the establishment and enhancement of homeland security preparedness organizations, programs, and processes. While individual components within the framework may change over time, the framework should remain robust and relatively unchanged.
- ▶ How is the Handbook different from HSEEP?
 - The HSEEP Guidance and the Handbook guidelines are complementary to one another.
- ▶ How does the Handbook relate to NCJA Grants Management?
 - The Handbook targets developing managerial and organizational structures and processes to support holistic, coordinated homeland security program management and NCJA's TA helps grant administrators implement promising practices and improve the performance of various tasks associated with grants administration.
- ▶ What is the timeframe for delivering the Handbook?
 - ODP recognizes that each state and urban area will want to approach dissemination and delivery of the Handbook in its own way. Because of this, ODP has not set a timeframe for delivering the Handbook. However, ODP recommends that delivery of the Handbook happen as soon as possible as the guidelines contained within the Handbook can help state and local governments organize themselves as they attempt to become compliant with federal initiatives and policy.



Sample Cover Letter/Email Language for Program Managers

Greetings,

The Office for Domestic Preparedness (ODP) has developed the “ODP Program Management Handbook” to provide practical assistance for strengthening State, local, and tribal homeland security programs. The Handbooks are being distributed across our state to managers and points of contact as a practical tool to help you organize and manage key aspects of State, local, and tribal homeland security programs, including planning equipment, training, and exercises. We have identified you as a manager of **XXXX** in **XXXX** and, therefore, attached/enclosed is a Handbook for your use. **[REFERENCE THE FORM IN WHICH THEY WILL RECEIVE IT—LOOSE LEAF, CD, etc.]**

ODP developed the “ODP Program Management Handbook” with input from Federal, State, and local officials involved in homeland security. The guidelines contained within the Handbook are not a mandated management approach intended to supplant existing systems and processes that are effective – neither is the Handbook a set of formal grant management standards or additional requirements for receiving grant funding. Rather, the Handbook has been developed to help administrators manage multiple homeland security-related initiatives and programs by serving as a resourceful tool for building and improving program management.

The Handbook is being disseminated as homeland security administrators face increasing responsibilities from national preparedness initiatives such as the National Incident Management System (NIMS), the National Response Plan (NRP), and the National Preparedness Goal. Together, these initiatives form a common approach and establish a shared commitment among Federal, State, local, and tribal governments and the private sector to strengthen our Nation’s preparedness by building effective capabilities to prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies. The program management fundamentals outlined in this Handbook will support the management of core elements that are common throughout these initiatives – planning, equipment, training, and exercises. Successful implementation of these initiatives ultimately depends on robust collaboration and an integrated approach that effectively coordinates the capabilities and resources of various agencies, organizations, and individuals from many tiers of public and private sectors.

We anticipate that the Handbook will be of great assistance to you in better organizing your program management activities. Please contact **[insert POC]** if you have further questions or comments regarding the Handbook.

SIGNATURE

CONTACT INFORMATION

State Policy Maker Dissemination Plan Guidance

Purpose

The Office for Domestic Preparedness (ODP) has developed the “ODP Program Management Handbook” to provide practical assistance for strengthening State, local, and tribal homeland security programs. The goal of this guidance is to enable SAAs/UASIs to follow a simple process to disseminate the Handbook as seamlessly and as quickly as possible, while introducing and explaining them sufficiently.

Getting Started

ODP will rely on the program administrator within the SAA/UASI to brief the Handbook to policy makers throughout the state who are involved in homeland security programs and who they want to have an opportunity to learn more about it. The purpose of the State Policy Maker Dissemination Plan Guidance is to provide the SAAs/UASIs assistance in:

- Identifying State Policy Makers who should be briefed regarding the handbook
- Selecting the appropriate option and delivery schedule

Selecting a Handbook Delivery Option to State Policy Makers

ODP is providing an outline of three different options for dissemination ranging from participating in regional or statewide meetings to distributing the Handbooks via mail. The SAA/UASI can select the option that best meets the needs of their states and is the most feasible solution given existing resources. To assist SAAs/UASIs in determining the best method of disseminating the Handbooks, ODP has described the steps necessary to disseminate the Handbook for each option and has also identified some potential pros and cons of using each option.

OPTION A: BRIEFINGS

Description, Pros & Cons:

<i>Option</i>	<i>Description</i>	<i>Pros</i>	<i>Cons</i>
A. Briefing	<ul style="list-style-type: none"> The SAA/UASI would make a presentation of the Handbook to a group of one or more identified policy makers. This would likely take place at an already scheduled meeting. 	<ul style="list-style-type: none"> Face-to-face delivery provides an opportunity to explain the Handbook's uses and underscores its importance. 	<ul style="list-style-type: none"> It may be difficult to organize a briefing given the scheduling demands of the policy makers. It is necessary to plan ahead to request time on the agenda.

Steps for disseminating via briefings:

1. Identify those policy makers who should receive the Handbook presentation as described in the "Identifying Program Stakeholders" Guideline in the Program Administrator Guidelines section of the Handbook.
2. Obtain policy maker contact information.
3. Identify appropriate venue and location to brief the Handbook (e.g., Senior Advisory Committee Meeting).
4. Identify who is setting the agenda for the meeting and request time on the agenda. (See sample located in the Dissemination Resources Section of the Tool Kit.)
5. Identify presenter(s).
6. Identify the necessary materials for the meeting and who is responsible for preparing them.

Example of tracking logistics:

<i>Name of Policy Maker and Email</i>	<i>Address</i>	<i>Phone</i>	<i>Venue and Location</i>	<i>Agenda POC and Contact Info</i>	<i>POC for Requesting Time on Agenda</i>	<i>Date of Meeting</i>	<i>Presenter</i>	<i>Necessary Materials and POC</i>	<i>Date Completed</i>
Senator Wilson Senator.Wilson@wa.gov	4325 State Capitol Dr. Capitol City, WA 98765	Admin Assistant: 333-333-3333	SAC Meeting	Bob Jones 222-222-2222	Jim Brown	Dec. 5, 2005	Carrie Black	Binders, presentations Sally Smith	Dec. 5, 2005

OPTION B: ONE-ON-ONE MEETINGS

Description, Pros & Cons:

<i>Option</i>	<i>Description</i>	<i>Pros</i>	<i>Cons</i>
B. One-on-one meetings	<ul style="list-style-type: none"> This is more informal than the presentation option. The SAA/UASI would deliver the briefing about the Handbook in individual meetings with select state policy makers. 	<ul style="list-style-type: none"> Face-to-face delivery provides the opportunity to explain the Handbook's uses and underscores its importance. This option does not require conference/meeting planning. This option provides an opportunity to address issues specific to that policy maker. 	<ul style="list-style-type: none"> Many one-on-one meetings could be necessary to deliver to all identified policy makers; this could be time consuming with a potential inability to reach all policy makers. It may be difficult to deliver a consistent message regarding the Handbook from meeting to meeting.

Steps for disseminating via one-on-one meetings:

1. Identify those policy makers who should receive the Handbooks as described in the "Identifying Program Stakeholders" Guideline in the Program Administrator Guidelines section of the Handbook.
2. Obtain policy maker contact information.
3. Contact the policy maker or his/her scheduler to determine available meeting dates and times as well as location.
4. Identify the presenter.
5. Determine meeting agenda (see sample located in the Dissemination Resources Section of the Tool Kit—it is possible to use an abbreviated version of this for one-on-one meeting).
6. Identify the necessary materials for the meeting and who is responsible for preparing them.

Example of tracking logistics:

<i>Name of Policy Maker and Email</i>	<i>Address</i>	<i>Phone</i>	<i>Available Dates / Times / Locations for Meeting</i>	<i>POC for Contacting Scheduler</i>	<i>Presenter</i>	<i>Meeting Agenda Complete</i>	<i>Necessary Materials and POC</i>	<i>Date Completed</i>
Senator Wilson Senator.Wilson@wa.gov	4325 State Capitol Dr. Capitol City, WA 98765	Admin Assist: 333-333-3333	8:00 am Dec. 7, 2005 State Capitol Office 4521	Jerry Ryan	Jerry Ryan	Yes	Sally Smith	Dec. 7, 2005

OPTION C: MAIL/EMAIL

Description, Pros & Cons:

<i>Option</i>	<i>Description</i>	<i>Pros</i>	<i>Cons</i>
C. Mail/email	<ul style="list-style-type: none"> The letter or email would be an FYI of the Handbook's presence in the state and would provide contact information if the policy maker would like additional information. 	<ul style="list-style-type: none"> This option provides the ability to reach many policy makers at once without having to organize meetings. This option provides the ability to deliver a consistent message to all policy makers who will receive the information about the Handbook. 	<ul style="list-style-type: none"> The lack of face-to-face delivery does not allow the SAA/UASI to explain the Handbook's uses or underscore its importance.

Steps for disseminating via mail/email:

1. Identify those policy makers who should receive a letter or email regarding the Handbooks as described in the "Identifying Program Stakeholders" Guideline in the Program Administrator Guidelines section of the Handbook and identify those stakeholders who should be copied on the email or mailing.
2. Obtain policy maker contact information.
3. Set a target date for dissemination.
4. Determine if mail or email is more effective means of delivery and identify POC to coordinate.
5. Tailor email/cover letter language if desired.
6. Determine a POC who will be responsible for fielding possible follow up questions.

Example of tracking logistics:

<i>Name of Policy Maker and Email</i>	<i>Address</i>	<i>Phone</i>	<i>Target Date for Dissemination</i>	<i>Mail or Email?</i>	<i>POC for Tailoring Language</i>	<i>POC for Coordinating Mailing / Emailing</i>	<i>POC for Follow up</i>	<i>Date Completed</i>
Senator Wilson Senator.Wilson@wa.gov	4325 State Capitol Dr. Capitol City, WA 98765	333-333-3333	Dec. 7, 2005	Mail	Jerry Ryan	Sally Smith	Jerry Ryan	Dec. 7, 2005

Resources for Disseminating to State Policy Makers

- I. Sample Session Design for Handbook Presentation**
- II. “ODP Program Management Handbook: Executive Briefing”— with talking points for the presenter**
- III. “ODP Program Management Handbook: Executive Briefing”—handout for the recipient**
- IV. Sample Cover Letter/Email Language for Policy Makers**

BACKGROUND

Purpose

To present the Handbook to state policy makers who have a vested interest in ensuring that their respective State's homeland security programs are managed effectively.

Scope

The briefing will consist of a 30 minute session¹ with the following activities:

- Deliver the overview presentation “ODP Program Management Handbook: Executive Briefing”
- Q & A
- Next steps

DRAFT AGENDA

<i>Time</i>	<i>Topic</i>	<i>Objectives</i>	<i>Approach</i>	<i>Session Notes</i>
5 minutes	Welcome / Introduction	<ul style="list-style-type: none">‣ To welcome attendee(s)‣ To provide an overview and background for the session	<ul style="list-style-type: none">‣ SAA / UASI Administrator: thank policy maker(s) for coming and provide agenda / session overview	<ul style="list-style-type: none">‣ Talking points‣ Agendas
10 minutes	Program Management Handbook	<ul style="list-style-type: none">‣ To deliver the ODP Program Management Handbook Executive Briefing	<ul style="list-style-type: none">‣ SAA / UASI Administrator: deliver the ODP Program Management Handbook Executive Briefing that is provided in the Handbook Tool Kit	<ul style="list-style-type: none">‣ Talking points‣ PowerPoint presentation‣ Copies of the Handbook
10 minutes	Q & A	<ul style="list-style-type: none">‣ To answer questions relating to the Handbook	<ul style="list-style-type: none">‣ Attendee(s): ask the SAA / UASI any outstanding questions they may have regarding the Handbook	<ul style="list-style-type: none">‣ FAQs
5 minutes	Next Steps	<ul style="list-style-type: none">‣ To discuss implementation of the Handbook‣ To set expectations of how the Handbook should be used	<ul style="list-style-type: none">‣ SAA/ UASI Administrator: discuss the plans for distributing the Handbooks throughout the state and expectations about how program managers should use them	

¹ Time frame and presentation content can be adjusted to fit time allotted for presentation and other considerations.



ODP Program Management Handbook Executive Briefing



- ▶ This is a briefing on the “ODP Program Management Handbook,” a new resource being provided by the Office of Domestic Preparedness (ODP) to homeland security State Administrative Agencies and designated Urban Areas all across the nation who receive Federal homeland security grant funds
- ▶ The Handbook will be used by homeland security administrators and managers throughout our state as a tool to improve holistic program management
- ▶ We want to ensure that you are aware of this new program management resource that will be implemented within our state
- ▶ We hope that you will support this approach and continue to support our efforts to make our homeland security programs stronger

The Program Management Handbook is a management tool for homeland security administrators and managers

Key messages regarding the (1) background, (2) target audiences, and (3) suggested uses of the Handbook

► **Background:**

- The Handbook is being disseminated as homeland security administrators face increasing responsibilities from national preparedness initiatives such as the NIMS, NRP, and the National Preparedness Goal
- The Handbook outlines program management fundamentals that can support the management of core elements that are common across various initiatives: planning, equipment, training, and exercises

► **Target Audiences:**

- Homeland security administrators at State and local levels (e.g., program administrators within the State Administrative Agency (SAA) and designated Urban Areas)
- Managers or points of contact throughout the State who are directly responsible for implementing various aspects of homeland security, including: planning, equipment, training, and exercise activities

► **Suggested Uses:**

- Resource to help administrators manage multiple homeland security-related initiatives and programs
- Guide for developing program management work plans
- Tool to gauge existing program management processes and performance
- Guide for developing employee performance plans



- Foremost, the Handbook is being disseminated as state and local administrators face increasing responsibilities from national preparedness initiatives such as the NIMS, NRP, and the National Preparedness Goal
- The Handbook outlines program management fundamentals that can support the management of planning, equipment, training, and exercise activities – these are four elements which are common throughout multiple preparedness initiatives
- The Handbook’s guidelines can be used by two audiences: one guideline set is for administrators within the SAA or Urban Area who are responsible for coordinating all homeland security efforts
- The remaining guidelines can be used by points of contact who are directly responsible for implementing activities associated with planning, equipment, training, and exercises
- The guidelines emphasize collaboration and coordination, especially across disciplines and with the private sector
- Finally, the Handbook is not a mandated approach – it should serve as a management resource and reference
- Here we’ve also described a few additional ways the Handbook can be used

The Handbook contains the following resources and information in a user-friendly format

Handbook Component	Description
Foreword	▶ High-level, executive management summary that explains the intent of the Handbook as a tool to provide assistance
About the Handbook	▶ Brief, upfront description of the Handbook components and illustration of how the work plans should be used
Guideline Prefaces	▶ One-page introduction for each guideline set that explains how the guidelines can be used
Guidelines	<p>▶ Five guideline sets; one for homeland security administrators (e.g., administrators within the SAA and UASI region) and four for planning, equipment, training, and exercise activities</p> <p>▶ Guidelines are written in a user-friendly, checklist format</p>
Guideline Work Plans	▶ Templates accompanying each guideline page that enable the user to plan and track activity completion
Working Calendars	▶ Calendars for each guideline set that enable the user to create and track program milestones and deadlines
Program Management Resources	<p>▶ A list of ODP websites and contacts for further information regarding program management</p> <p>▶ Sample templates and planning documents that enhance the guidelines</p>
Glossary	▶ Contextual definitions of Handbook terms and acronyms



- ▶ The Handbook format is useful tool to program managers (refer to the samples)
- ▶ The first section of the Handbook is an introduction with a letter from Tim Beres, the director of ODP, explaining the background, purpose, and uses of the Handbook as well as a section that outlines how to use the various sections of the Handbook
- ▶ The following sections contain 5 sets of guidelines with one set for administrators within the SAA or UASI; the other guidelines are for managers or points of contact who oversee planning, equipment, training and exercises activities
- ▶ The guidelines are formatted in a check list style with an accompanying work plan on the opposite page where users can track who is the POC responsible for completing the activity, the completion date as well as any other relevant information to the task
- ▶ Each section also has a resource list with ODP resources/contacts for each and a calendar to track milestones and deadlines
- ▶ Next is a glossary of terms and acronyms used throughout the Handbook

Holistic program management can assist State and locals as they prepare to prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies

Holistic program management involves...

An integrated approach demonstrating robust collaboration between the public and private sectors, different levels of government, multiple jurisdictions, and departments and agencies within a single jurisdiction to accomplish core activities related to:

Planning

Equipment

Training

Exercises

...that supports the mission areas of the National Preparedness Goal:

Prevent

Protect

Respond

Recover



- ▶ The Handbook does have a strong connection with the National Preparedness Goal, because strong program management is going to the mechanism that enables each state and region to develop and coordinate capabilities to better prevent, protect against, respond to, and recover from terrorist acts, disasters, and emergencies
- ▶ And as the slide shows, holistic management involves collaboration between the public and private sectors, among levels of government, and many stakeholders to accomplish activities associated with planning, equipment, training, and exercises, which are common elements found throughout many preparedness initiatives
- ▶ States and Urban Areas are getting a lot of guidance at a detailed level. What's missing is the assistance to help implement that detail. This Handbook provides the infrastructure to pull it together

Sound program management enables development and coordination of core elements needed to achieve Target Capability outcomes

ILLUSTRATIVE

Example Target Capability

Core Elements Involved in Achieving Capability Outcomes

Program Management Handbook: Support for Developing and Coordinating Core Elements



Planning

- ▶ All applicable legislation, regulations, related plans, directives, policies, & industry codes of practice required to conduct emergency response
- ▶ Emergency Operations Plan consistent with NRP/NIMS and applicable laws and regulations
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- ▶ Conducting an assessment to identify planning priorities
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- ▶ Identifying training stakeholders
- ▶ Communicating with training stakeholders
- ▶ Developing a training approach

Exercises, Evaluations, and Corrective Actions

- ▶ Exercises to test and evaluate vulnerabilities and hazards
- ▶ System for incorporating lessons learned into plans and procedures

Sample Exercise Guidelines

- ▶ Conducting an assessment to develop exercise priorities
- ▶ Developing an exercise approach



Homeland Security

- ▶ For example, looking at the Target Capabilities – and here we see Risk Analysis – there are combinations of planning, equipment, training, and exercise elements recommended for each capability
- ▶ As you can see, the management guidelines are aligned with these elements, and they can help administrators or managers organize themselves effectively to implement and accomplish the recommended planning, equipment, training, and exercise components

Version 1.0 of the Handbook was delivered to SAA and UASI representatives during three conferences in the late summer and early fall of 2005

- ▶ The Handbook was delivered to all homeland security SAA and UASI administrators during regional conferences
- ▶ The national, widespread dissemination of the Handbook underscores the increasing emphasis on results-based performance and holistic management of multiple homeland security initiatives and funded programs
- ▶ As the Handbook is implemented, ODP will solicit feedback on its usability and issue subsequent versions on an annual basis



- ▶ ODP delivered these Handbooks at the Regional Conference we attended on <DATE>
- ▶ They delivered them to all States and Urban Areas across the nation

The Handbook is being disseminated to administrators and managers across our State who administer and oversee homeland security activities

<i>Name</i>	<i>Jurisdiction / Region</i>	<i>Homeland Security Program Management Affiliation</i>



- ▶ We, in turn, are disseminating the Handbooks throughout our state and region and here you see who else in the State has received the Handbook
- ▶ The goal is that we will all be working within a common program management framework so that we can increase coordination across the State
- ▶ Our hope is that users within the State will network with one another and share lessons learned as well as promising practices; this sort of information sharing is one of the best, and relatively easy, ways we have of enhancing our homeland security program management

Frequently Asked Questions about the Handbook...

- ▶ Will the guidelines in the Handbook be a requirement for future grant programs?
 - Implementation of the Handbook is not a requirement. ODP's goal is to support the development of holistic program management capabilities. Holistic program management will help us develop, coordinate, and maintain the capabilities that will enable our nation to better prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies.
- ▶ Who was involved in the development process?
 - A team of Federal Preparedness, Training, and Exercise officers assisted in developing and tailoring the Handbook for unique homeland security program management responsibilities.
 - State and local representatives provided feedback and recommendations for the improving initial Handbook versions; these representatives also participated in several conference calls to provide feedback and input on subsequent Handbook versions.
- ▶ How is the Handbook related to HSPD-8 and the National Preparedness Goal?
 - These initiatives form a common approach and establish a shared commitment among Federal, State, local, and tribal governments and the private sector to strengthen our Nation's preparedness by building effective capabilities to prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies. *The program management fundamentals outlined in this Handbook will support the management of core elements that are common throughout the initiatives – planning, equipment, training, and exercises.* Successful implementation of the initiatives ultimately depends on robust collaboration and an integrated approach that incorporates these elements and encompasses a wide range of activities aimed at coordinating the capabilities and resources of various entities including agencies, organizations, and individuals from many tiers of public and private sectors.



This is a list of frequently asked questions—let's review them.

Frequently Asked Questions about the Handbook (cont.)...

- ▶ Does the Handbook outline a specific organizational structure that states should implement in order to manage their programs?
 - The Handbook outlines a common framework which can guide the establishment and enhancement of homeland security preparedness organizations, programs, and processes. While individual components within the framework may change over time, the framework should remain robust and relatively unchanged.
- ▶ How is the Handbook different from HSEEP?
 - The HSEEP Guidance and the Handbook guidelines are complementary to one another.
- ▶ How does the Handbook relate to NCJA Grants Management?
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This is a list of frequently asked questions—let's review them.



ODP Program Management Handbook Executive Briefing



**Homeland
Security**

The Program Management Handbook is a management tool for homeland security administrators and managers

*Key messages
regarding the
(1) background,
(2) target
audiences, and
(3) suggested
uses of the
Handbook*

► **Background:**

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► **Target Audiences:**

- Homeland security administrators at State and local levels (e.g., program administrators within the State Administrative Agency (SAA) and designated Urban Areas)
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► **Suggested Uses:**

- Resource to help administrators manage multiple homeland security-related initiatives and programs
- Guide for developing program management work plans
- Tool to gauge existing program management processes and performance
- Guide for developing employee performance plans



**Homeland
Security**

The Handbook contains the following resources and information in a user-friendly format

Handbook Component	Description
Foreword	<ul style="list-style-type: none"> ▶ High-level, executive management summary that explains the intent of the Handbook as a tool to provide assistance
About the Handbook	<ul style="list-style-type: none"> ▶ Brief, upfront description of the Handbook components and illustration of how the work plans should be used
Guideline Prefaces	<ul style="list-style-type: none"> ▶ One-page introduction for each guideline set that explains how the guidelines can be used
Guidelines	<ul style="list-style-type: none"> ▶ Five guideline sets; one for homeland security administrators (e.g., administrators within the SAA and UASI region) and four for planning, equipment, training, and exercise activities ▶ Guidelines are written in a user-friendly, checklist format
Guideline Work Plans	<ul style="list-style-type: none"> ▶ Templates accompanying each guideline page that enable the user to plan and track activity completion
Working Calendars	<ul style="list-style-type: none"> ▶ Calendars for each guideline set that enable the user to create and track program milestones and deadlines
Program Management Resources	<ul style="list-style-type: none"> ▶ A list of ODP websites and contacts for further information regarding program management ▶ Sample templates and planning documents that enhance the guidelines
Glossary	<ul style="list-style-type: none"> ▶ Contextual definitions of Handbook terms and acronyms

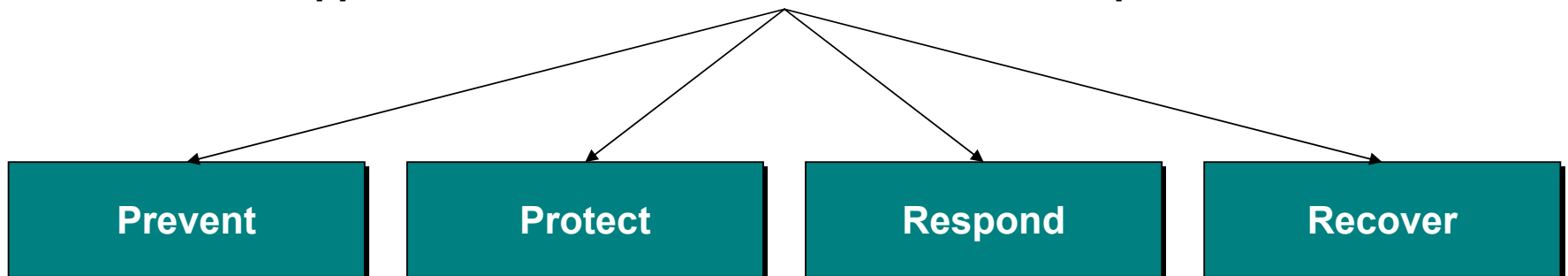
Holistic program management can assist State and locals as they prepare to prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies

Holistic program management involves...

An integrated approach demonstrating robust collaboration between the public and private sectors, different levels of government, multiple jurisdictions, and departments and agencies within a single jurisdiction to accomplish core activities related to:



...that supports the mission areas of the National Preparedness Goal:



Sound program management enables development and coordination of core elements needed to achieve Target Capability outcomes

ILLUSTRATIVE

Example Target Capability

Core Elements Involved in Achieving Capability Outcomes

Program Management Handbook: Support for Developing and Coordinating Core Elements

Risk Analysis

Planning

- ▶ All applicable legislation, regulations, related plans, directives, policies, & industry codes of practice required to conduct emergency response
- ▶ Emergency Operations Plan consistent with NRP/NIMS and applicable laws and regulations
- ▶ Chemical inventory reports available under Emergency Planning and Community Right-to-know Act in association with the LEPC

Sample Planning Guidelines

- ▶ Conducting an assessment to identify planning priorities
- ▶ Developing a planning approach
- ▶ Incorporating legal and programmatic policies, requirements, standards, and regulations that impact planning

Equipment and Systems

- ▶ Geographic Information Systems tools Information-sharing network
- ▶ Modeling/simulation/analysis tools

Sample Equipment Guidelines

- ▶ Developing an equipment priority purchase list
- ▶ Evaluating equipment vendors

Training

- ▶ NIMS
- ▶ Technical (e.g. modeling/simulation and analysis tools training)
- ▶ Emergency planning and assessment for emergency response personnel

Sample Training Guidelines

- ▶ Identifying training stakeholders
- ▶ Communicating with training stakeholders
- ▶ Developing a training approach

Exercises, Evaluations, and Corrective Actions

- ▶ Exercises to test and evaluate vulnerabilities and hazards
- ▶ System for incorporating lessons learned into plans and procedures

Sample Exercise Guidelines

- ▶ Conducting an assessment to develop exercise priorities
- ▶ Developing an exercise approach



Homeland Security

Version 1.0 of the Handbook was delivered to SAA and UASI representatives during three conferences in the late summer and early fall of 2005

- ▶ The Handbook was delivered to all homeland security SAA and UASI administrators during regional conferences
- ▶ The national, widespread dissemination of the Handbook underscores the increasing emphasis on results-based performance and holistic management of multiple homeland security initiatives and funded programs
- ▶ As the Handbook is implemented, ODP will solicit feedback on its usability and issue subsequent versions on an annual basis

The Handbook is being disseminated to administrators and managers across our State who administer and oversee homeland security activities

<i>Name</i>	<i>Jurisdiction / Region</i>	<i>Homeland Security Program Management Affiliation</i>

Frequently Asked Questions about the Handbook...

- ▶ Will the guidelines in the Handbook be a requirement for future grant programs?
 - Implementation of the Handbook is not a requirement. ODP's goal is to support the development of holistic program management capabilities. Holistic program management will help us develop, coordinate, and maintain the capabilities that will enable our nation to better prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies.
- ▶ Who was involved in the development process?
 - A team of Federal Preparedness, Training, and Exercise officers assisted in developing and tailoring the Handbook for unique homeland security program management responsibilities.
 - State and local representatives provided feedback and recommendations for the improving initial Handbook versions; these representatives also participated in several conference calls to provide feedback and input on subsequent Handbook versions.
- ▶ How is the Handbook related to HSPD-8 and the National Preparedness Goal?
 - These initiatives form a common approach and establish a shared commitment among Federal, State, local, and tribal governments and the private sector to strengthen our Nation's preparedness by building effective capabilities to prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies. *The program management fundamentals outlined in this Handbook will support the management of core elements that are common throughout the initiatives – planning, equipment, training, and exercises.* Successful implementation of the initiatives ultimately depends on robust collaboration and an integrated approach that incorporates these elements and encompasses a wide range of activities aimed at coordinating the capabilities and resources of various entities including agencies, organizations, and individuals from many tiers of public and private sectors.



Frequently Asked Questions about the Handbook (cont.)...

- ▶ Does the Handbook outline a specific organizational structure that states should implement in order to manage their programs?
 - The Handbook outlines a common framework which can guide the establishment and enhancement of homeland security preparedness organizations, programs, and processes. While individual components within the framework may change over time, the framework should remain robust and relatively unchanged.
- ▶ How is the Handbook different from HSEEP?
 - The HSEEP Guidance and the Handbook guidelines are complementary to one another.
- ▶ How does the Handbook relate to NCJA Grants Management?
 - The Handbook targets developing managerial and organizational structures and processes to support holistic, coordinated homeland security program management and NCJA's TA helps grant administrators implement promising practices and improve the performance of various task associated with grants administration.
- ▶ What is the timeframe for delivering the Handbook?
 - ODP recognizes that each state and urban area will want to approach dissemination and delivery of the Handbook in its own way. Because of this, ODP has not set a timeframe for delivering the Handbook. However, ODP recommends that delivery of the Handbook happen as soon as possible as the guidelines contained within the Handbook can help state and local governments organize themselves as they attempt to become compliant with federal initiatives and policy.



Sample Cover Letter/Email Language for Policy Makers

Greetings,

The Office for Domestic Preparedness (ODP) has developed the “ODP Program Management Handbook” to provide practical assistance for strengthening State, local, and tribal homeland security programs. The guidelines and supplemental resources contained within the Handbook are not a mandated management approach intended to supplant existing systems and processes that are effective. Instead, the Handbook is intended to help administrators manage multiple homeland security-related initiatives and programs. It can also be used as a guide for developing program management work plans, a tool for gauging existing program management processes and performance, and a guide for developing employee performance plans.

The Handbook was developed by Federal, State, and local officials involved in homeland security in response to key findings from the Department of Homeland Security’s (DHS) Task Force on State and Local Homeland Security Funding regarding the management of grants. It provides program management resources for:

- Homeland security program administrators at State and local levels who oversee holistic homeland security programs (e.g., program administrators within the State Administrative Agency (SAA) and designated Urban Areas) and
- Managers or points of contact throughout the State who are directly responsible for implementing elements and activities associated with planning, equipment, training, and exercises.

The Handbook is being disseminated as homeland security administrators face increasing responsibilities from national preparedness initiatives such as the National Incident Management System (NIMS), the National Response Plan (NRP), and the National Preparedness Goal. Together, these initiatives form a common approach and establish a shared commitment among Federal, State, local, and tribal governments and the private sector to strengthen our Nation’s preparedness by building effective capabilities to prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies. The program management fundamentals outlined in this Handbook will support the management of core elements that are common throughout these initiatives – planning, equipment, training, and exercises. Successful implementation of these initiatives ultimately depends on robust collaboration and an integrated approach that effectively coordinates the capabilities and resources of various agencies, organizations, and individuals from many tiers of public and private sectors.

State, local, and tribal homeland security administrators and managers can demonstrate this integrated approach through well-coordinated and sound management of homeland security programs and initiatives that involves:

- Applying the principles of unified command and adopting a systems-based approach to preparedness;
- Strengthening the network and collaborative efforts between key individuals, emergency responders, and other stakeholders who impact or are affected by homeland security, including the private sector;
- Organizing an effort to ensure the sustainability of homeland security programs in the long-term; and
- Embracing a proactive approach for measuring homeland security program management efforts.

Ultimately, holistic program management will help develop, coordinate, and maintain the infrastructure that will make our nation better prepared to prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies. We anticipate that the Handbook will be of great assistance to program managers throughout the state in better organizing and enhancing current program management structures. Please contact <insert POC> if you have further questions or comments regarding the Handbook.

ODP is relying on us, the program administrators within each SAA and Urban Area, to distribute the Handbook to key stakeholders throughout the State and Urban Area. If you have further questions regarding the Handbook or would like to see a copy of the Handbook, please contact **[INSERT POC]**.

SIGNATURE

CONTACT INFORMATION

Handbook Frequently Asked Questions

Q *Will the guidelines in the Handbook be a requirement for future grant programs?*

A Implementation of the Handbook is not a requirement. ODP's goal is to support the development of holistic program management capabilities. Holistic program management will help us develop, coordinate, and maintain the capabilities that will enable our nation to better prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies.

Q *Who was involved in the development process?*

A A team of Federal Preparedness, Training, and Exercise officers assisted in developing and tailoring the Handbook for unique homeland security program management responsibilities.

A State and local representatives provided feedback and recommendations for the improving initial Handbook versions; these representatives also participated in several conference calls to provide feedback and input on subsequent Handbook versions.

Q *How is the Handbook related to National Preparedness Goal, the National Incident Management System, the National Response Plan, and other national initiatives?*

A These initiatives form a common approach and establish a shared commitment among Federal, State, local, and tribal governments and the private sector to strengthen our Nation's preparedness by building effective capabilities to prevent, protect against, respond to, and recover from terrorist attacks, major disasters, and other emergencies. The program management fundamentals outlined in this Handbook will support the management of core elements that are common throughout these initiatives – planning, equipment, training, and exercises. Successful implementation of these initiatives ultimately depends on robust collaboration and an integrated approach that effectively coordinates the capabilities and resources of various agencies, organizations, and individuals from many tiers of public and private sectors.

Q *Does the Handbook outline a specific organizational structure that States should implement in order to manage their programs?*

A The Handbook outlines a common framework which can guide the establishment and enhancement of homeland security preparedness organizations, programs, and processes. While individual components within the framework may change over time, the framework should remain robust and relatively unchanged.

Q *How is the Handbook different from HSEEP?*

A The HSEEP Guidance and the Handbook guidelines are complementary to one another.

- Q *How is program management different from grants administration, and how does the Handbook relate to NCJA Grants Management?***
- A Program Management refers to the planning and implementation activities involved in managing mission-oriented programs in order to achieve tangible outcomes; grant administration usually refers to the financial management of funds and compliance with auditing and reporting requirements. The Handbook targets developing managerial and organizational structures and processes to support holistic, coordinated homeland security program management, and NCJA's TA helps grant administrators implement promising practices and improve the performance of various tasks associated with grants management.
- Q *What is the timeframe for delivering the Handbook to the States?***
- A ODP recognizes that each State and urban area will want to approach dissemination and delivery of the Handbook in its own way. Because of this, ODP has not set a timeframe for delivering the Handbook. However, ODP recommends that delivery of the Handbook happen as soon as possible as the guidelines contained within the Handbook can help State and local governments organize themselves as they attempt to become compliant with Federal initiatives and policies.
- Q *Are the guidelines best practices?***
- A The guidelines are suggested practices that can be used as guidelines for the fundamentals of program management.
- Q *How can the Handbook help States and urban areas that already have effective program / grant management in place?***
- A In addition to a resource for improving program management, this Handbook can be used as a guide for developing program management work plans, a tool for gauging existing program management processes and performance, and a guide for developing employee performance plans.
- Q *What if my jurisdiction requires significant political will at the State and local level to implement changes in program management?***
- A ODP has provided the Handbook Tool Kit that includes briefings and other materials which can be used to introduce and explain the Handbook and ODP's recommended program management approach to policy makers and other executives.
- Q *What's the relationship of this Handbook to the DHS "Report from the Task Force on State and Local Homeland Security Funding?"***
- A ODP reviewed findings from the DHS "Report from the Task Force on State and Local Homeland Security Funding" regarding inefficiencies in the flow of funds to State and local grantees. A key recommendation was that DHS should establish national standards for the management of grant funding. ODP recognizes that grant management is a component part of program management which encompasses an entire spectrum of activities involved in managing funds effectively and delivering strong programs. With this concept in mind, ODP has developed program management guidelines that emphasize strengthening the relationship between financial management and program performance.

- Q *This Handbook seems very comprehensive – how is a volunteer who also manages other responsibilities supposed to implement the Handbook?***
- A The Handbook should be used as a resource. The Handbook has sections that may be beneficial and helpful, and it has sections that may not be helpful for everyone – it is not a document that has to be thoroughly implemented to be helpful.
- Q *Why doesn't the Handbook include deadlines?***
- A ODP recognizes that each State has very different calendars and deadlines for achieving program management milestones. ODP did not attach deadlines to these activities because that would imply that a “one-size-fits-all” approach to implementing the Handbook throughout the country is effective.
- Q *How is the Handbook related to the National Preparedness Guidance?***
- A The program management fundamentals outlined in this Handbook will support the management of core elements that are common throughout national preparedness initiatives – planning, equipment, training, and exercise elements. Successful implementation of national preparedness initiatives ultimately depends on robust collaboration and an integrated approach across a wide range of activities aimed at coordinating the capabilities and resources of various entities including agencies, organizations, and individuals from many tiers of public and private sectors.
- Q *What's the working calendar for? How do I use it?***
- A The working calendar is to be used in keeping track of key program deadlines and milestones. Using a calendar makes it easier to see the relationship between deadlines and milestones.